

# Making Cooperation Work

# CÔMCEC STRATEGY

# For Building an Interdependent Islamic World

COMCEC  
TOURISM OUTLOOK  
2014  
(Revised Edition)



COMCEC

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# OUTLINE

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- ▶ The Importance of Tourism for Development
- ▶ Overview of International Tourism in the World
- ▶ International Tourism in the OIC Member Countries
- ▶ Tourism Opportunities and Challenges in the OIC Member Countries

# The Importance of Tourism for Development



A remarkable socio-economic phenomena

A critical sector in both advanced and developing economies

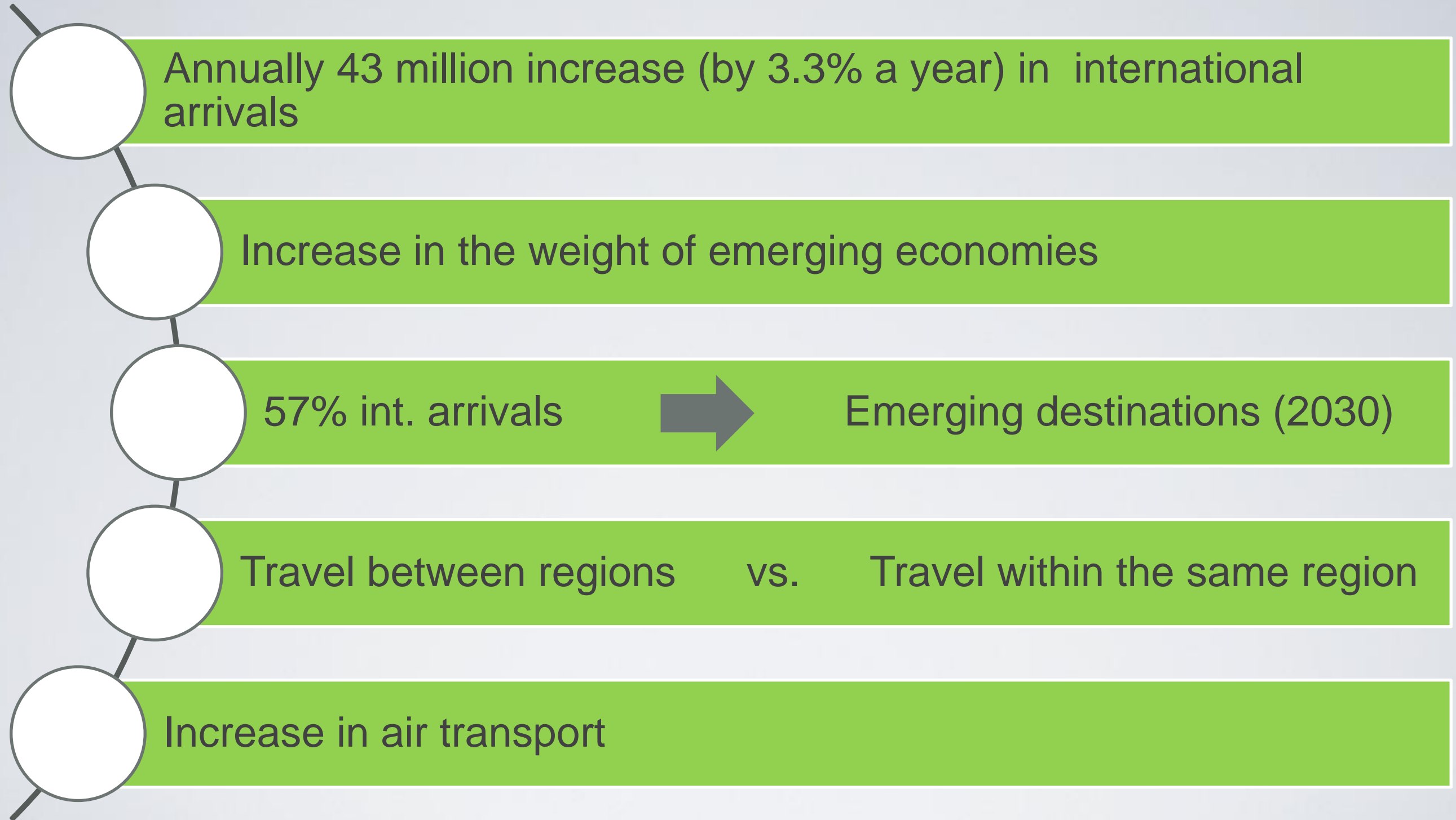
Related to more than 185 supply-side economic activities, with direct and indirect effects

# The Importance of Tourism for Development



Source: UNWTO Tourism Highlights, 2014 Edition

# Key Tourism Trends in the World



# Key Tourism Trends in the World

## Sustainability



- The concept of «**Green Economy**» will gain importance for tourism sector.



# Key Tourism Trends in the World

## Technology

- E-tickets
- E-visas
- Improved air and ground traffic handling
- New border control systems

**INTERNET**

Tourists' Choices as a Booking Channel (2013)

Internet (**65%**)

Travel Agencies (**24%**)

# Key Tourism Trends in the World

## Changing Consumer



Decrease in working time, more time for vacation

More experienced and demanding customers

Demographic change (ageing, migration and diversification of family structure), changing values and lifestyles

Increasing middle classes in emerging economies



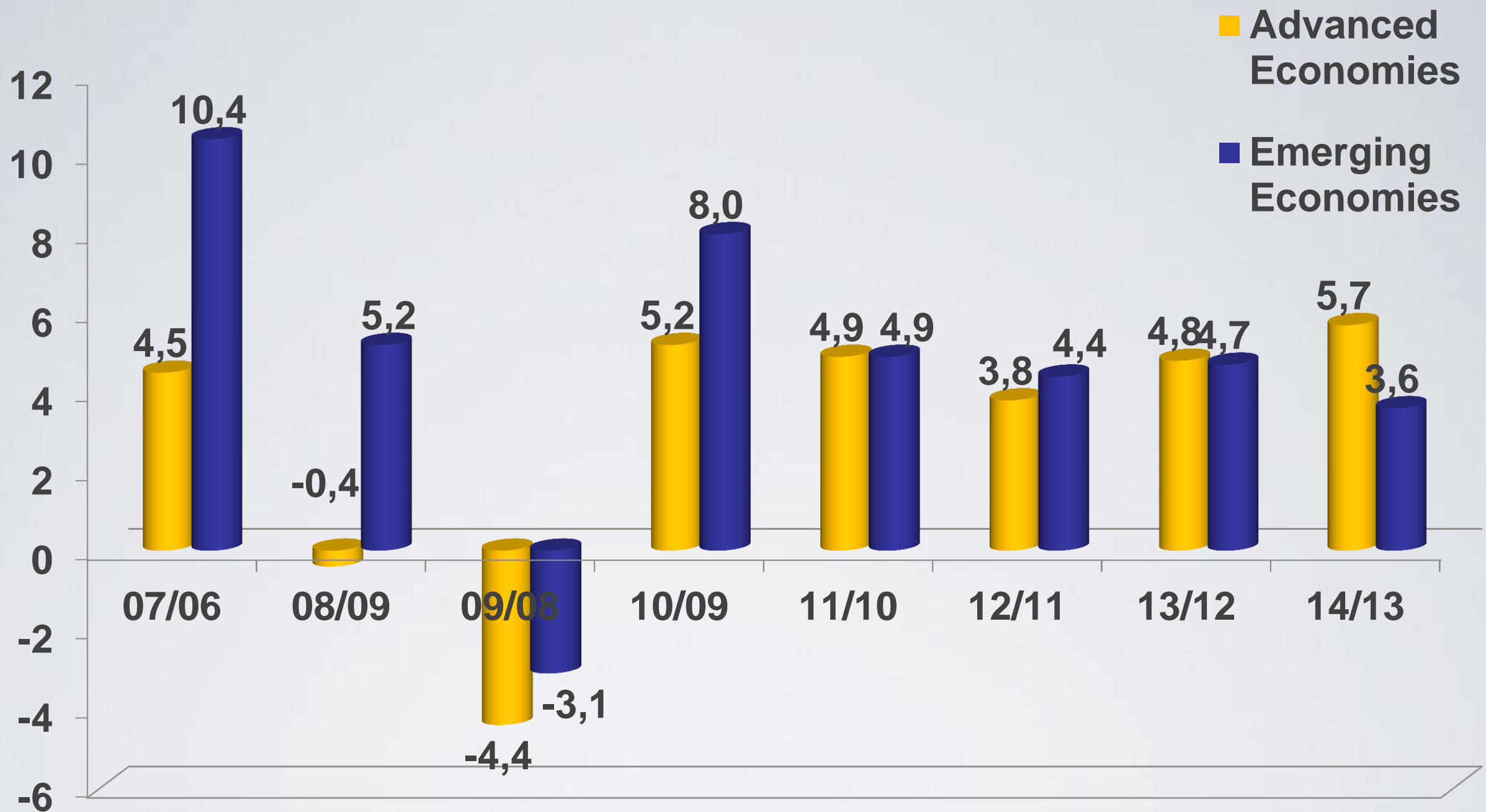
# International Tourist Arrivals



\* Forecast

Source: World Tourism Organization

# International Tourist Arrivals (%)



Source: UNWTO, World Tourism Barometer, Volume 13, January 2015

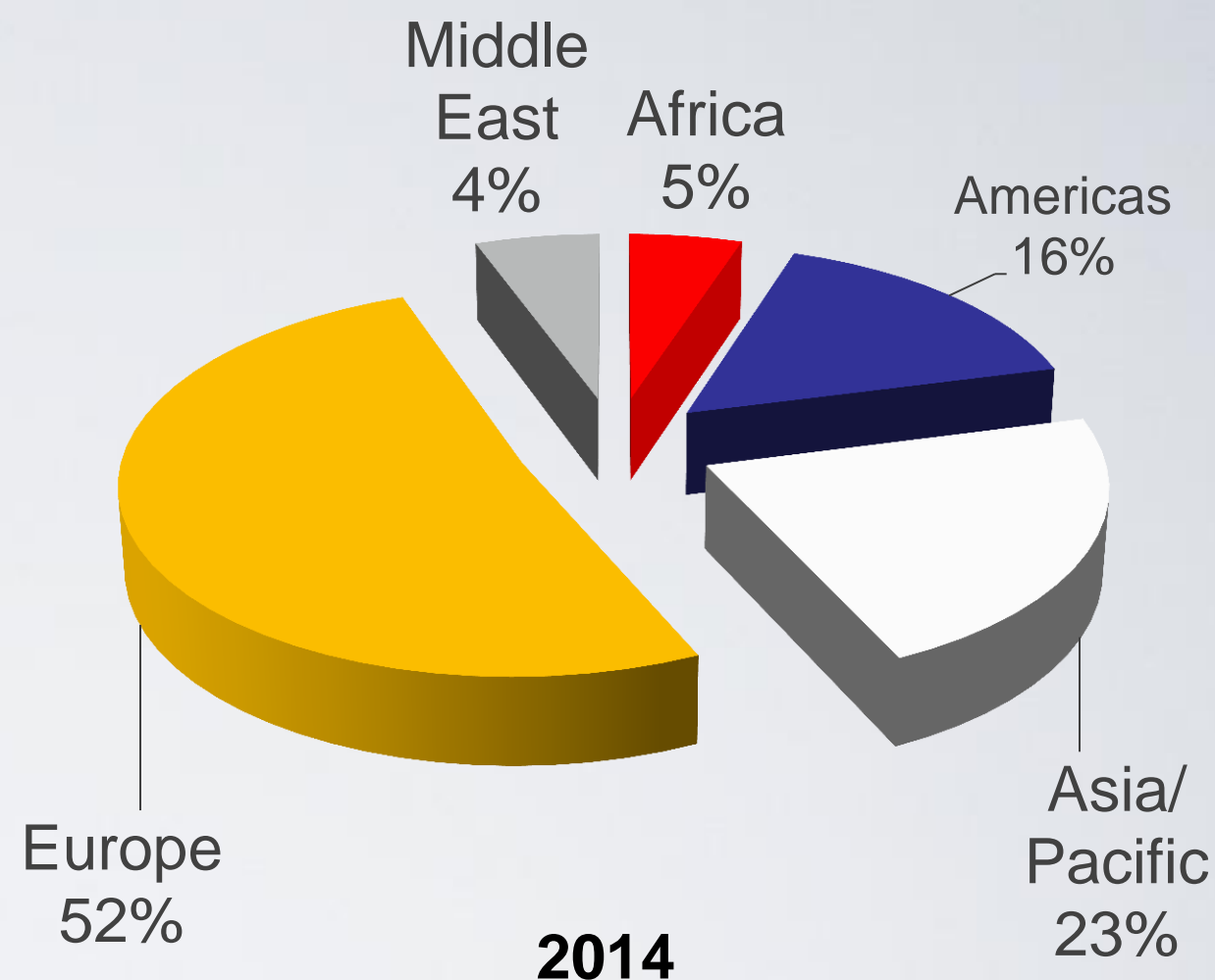
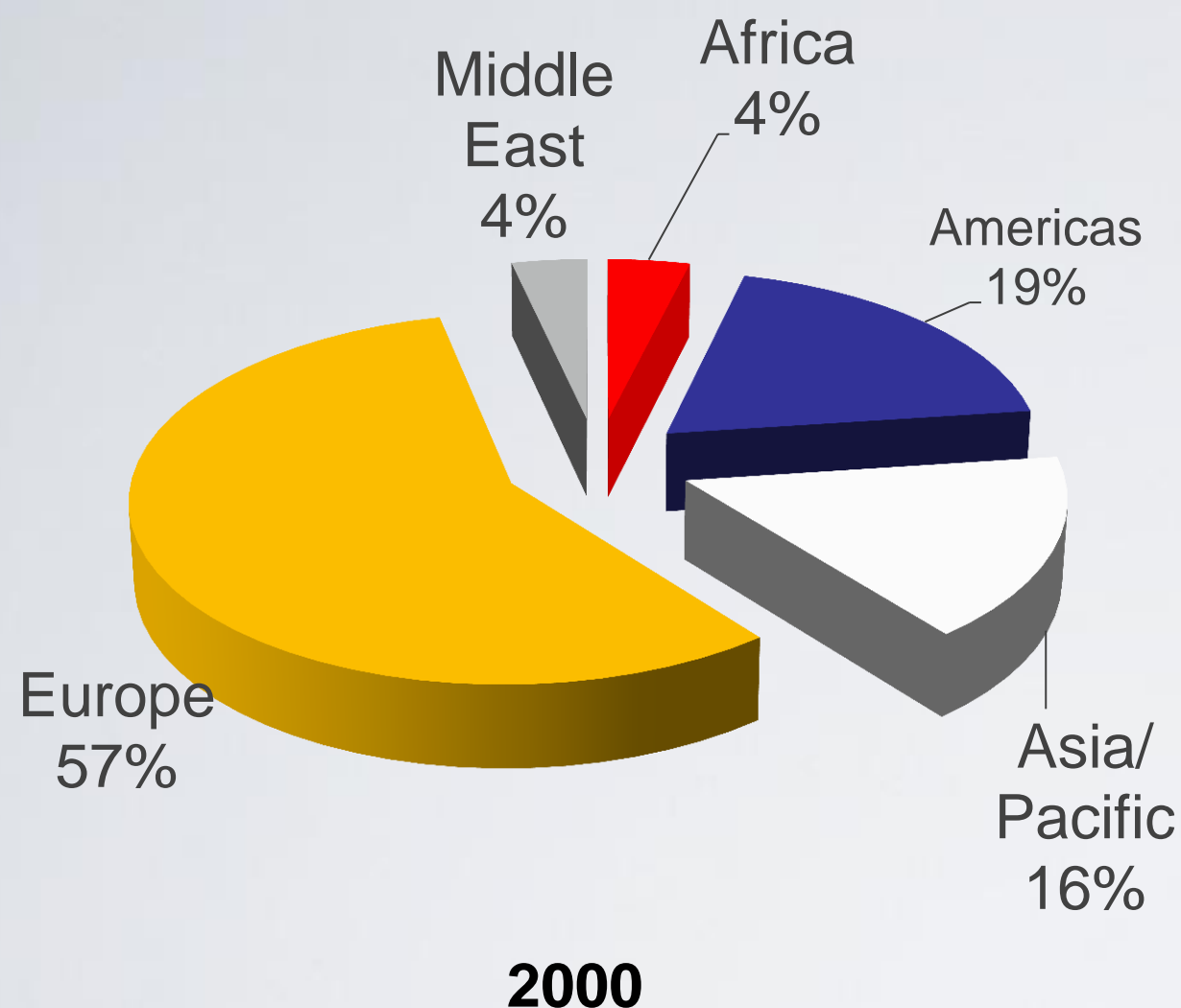
# International Tourist Arrivals

	(Millions)				
<b>Tourist Arrivals</b>	<b>2000</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>World</b>	<b>677</b>	<b>995</b>	<b>1.038</b>	<b>1.087</b>	<b>1.138</b>
<b>Europe</b>	<b>388.0</b>	<b>515.6</b>	<b>539.6</b>	<b>566.3</b>	<b>588.4</b>
<b>Asia and Pacific</b>	<b>110.1</b>	<b>218.5</b>	<b>233.8</b>	<b>249.8</b>	<b>263.0</b>
<b>Americas</b>	<b>128.2</b>	<b>156.1</b>	<b>162.5</b>	<b>168.1</b>	<b>180.6</b>
<b>Africa</b>	<b>26.2</b>	<b>49.7</b>	<b>52.2</b>	<b>54.7</b>	<b>56.0</b>
<b>Middle East</b>	<b>24.1</b>	<b>54.7</b>	<b>49.8</b>	<b>48.2</b>	<b>50.3</b>

Source: UNWTO, World Tourism Barometer, Volume 13, January 2015

# International Tourism- Market Share

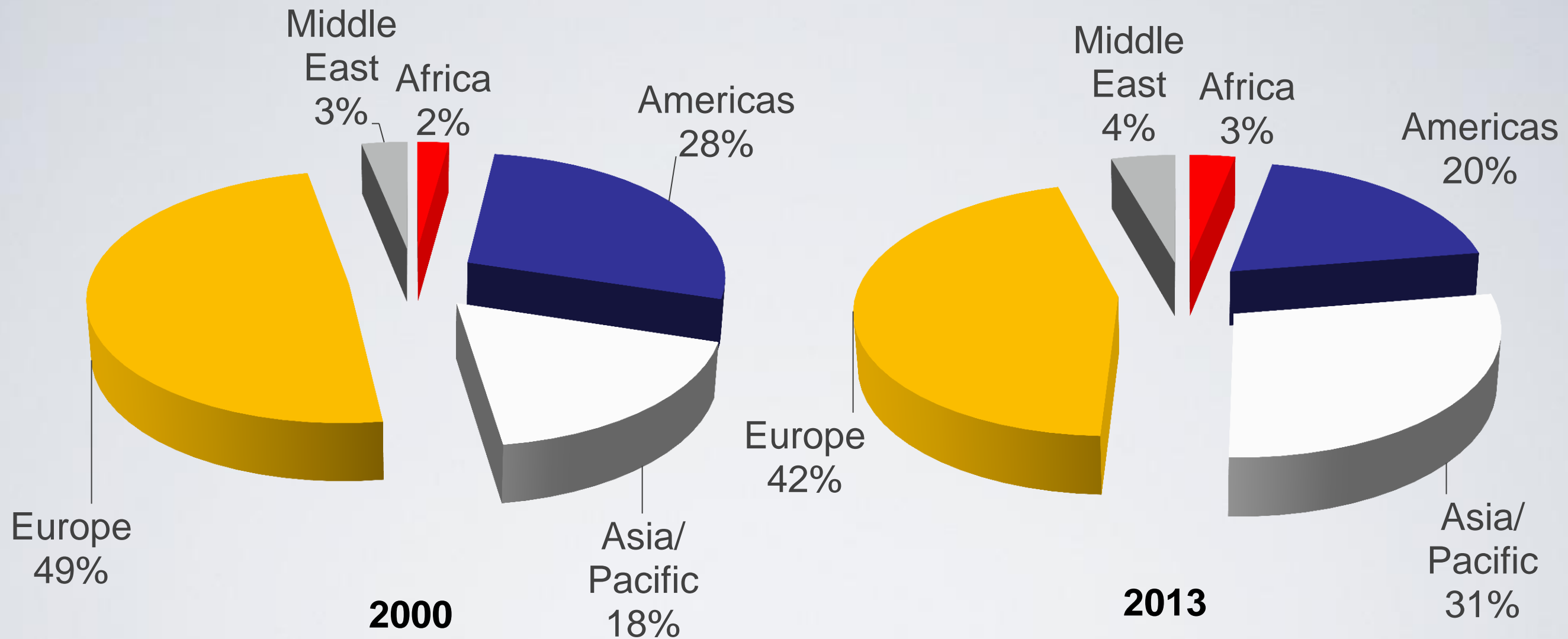
## Tourist Arrivals



Source: UNWTO, Tourism Highlights 2014 & World Tourism Barometer, Volume 13, January 2015

# International Tourism- Market Share

## Tourism Receipts



Source: UNWTO, Tourism Highlights 2014 & World Tourism Barometer, Volume 12, June 2014

# International Tourism Receipts (US \$ Billion)

<b>Tourism Receipts</b>	<b>2000</b>	<b>2012</b>	<b>2013</b>
<b>World</b>	<b>475</b>	<b>1.078</b>	<b>1.159</b>
<b>Europe</b>	<b>235</b>	<b>454</b>	<b>489</b>
<b>Asia and Pacific</b>	<b>87</b>	<b>329</b>	<b>360</b>
<b>Americas</b>	<b>133</b>	<b>213</b>	<b>229</b>
<b>Africa</b>	<b>11</b>	<b>34</b>	<b>34</b>
<b>Middle East</b>	<b>13</b>	<b>47</b>	<b>46</b>

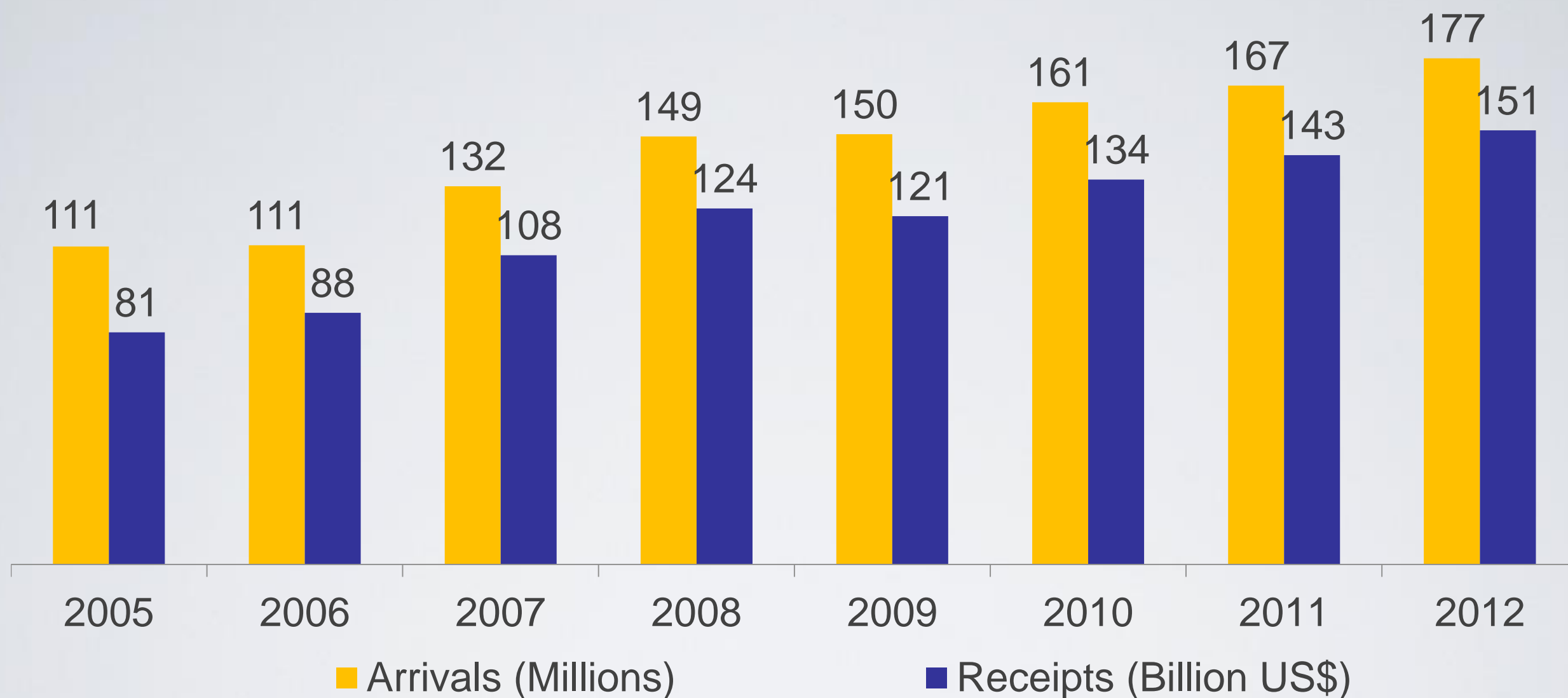
Source: UNWTO, Tourism Highlights 2002&2013 Edition& Tourism Barometer June 2014



# Prospects for 2015

- ▶ Continued Growth in 2015 (3 % - 4 % increase)
  - ▶ Uncertainty and Volatility in Africa & Middle East
  - ▶ Oil prices have declined
    - ▶ Lower transport costs
    - ▶ Boost economic growth by lifting PP
    - ▶ Negative impacts in oil exporting countries
- Special Demand in Oil Importing Countries

# International Tourism in the OIC Countries



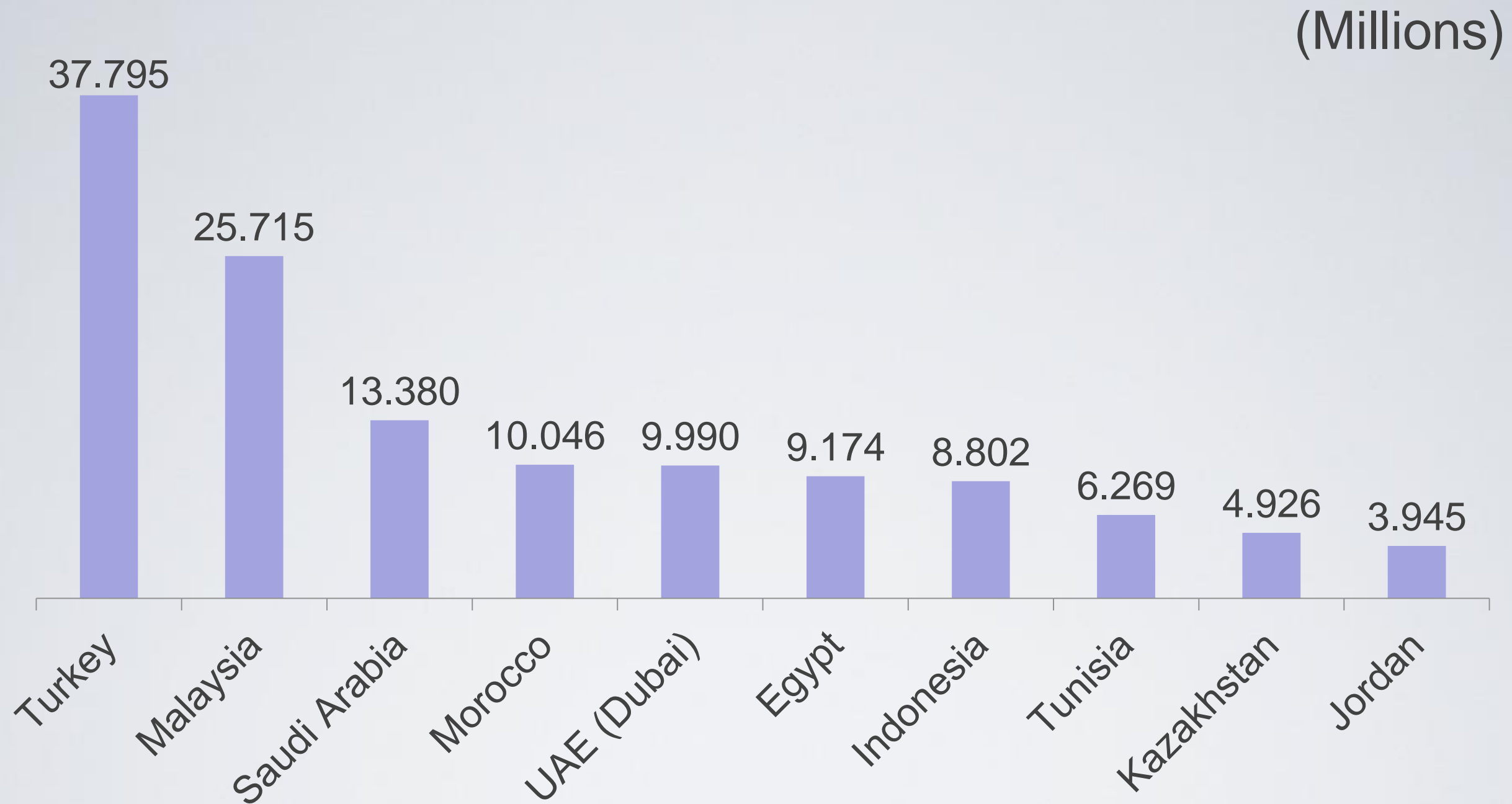
Source: Adopted from SESRIC, 2014

# International Tourism in the OIC Countries



Source: Adopted from SESRIC, 2014

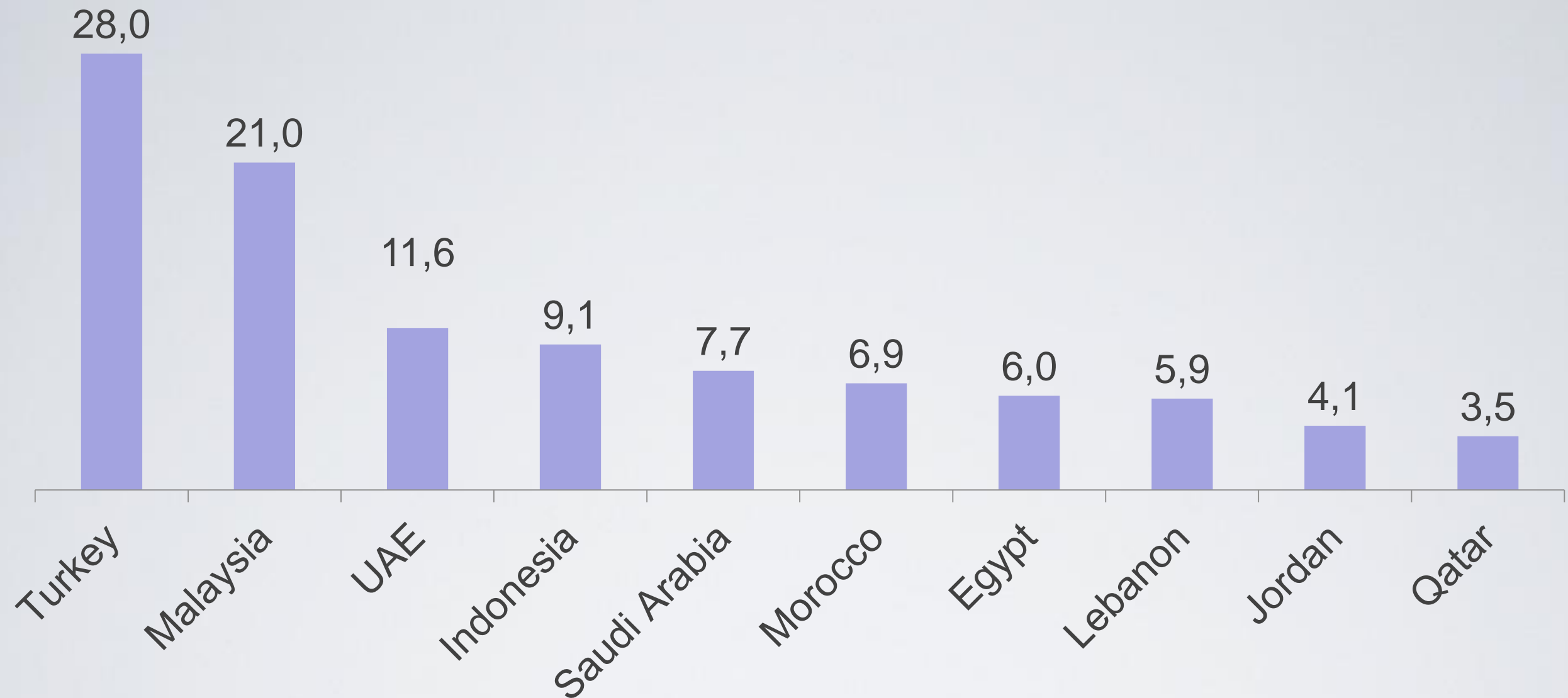
# Top 10 OIC Tourism Destinations in International Tourist Arrivals (2013)



☐ Top-10 countries hosted **130 million international tourist** in 2013.

# Top 10 OIC Tourism Earners in International Tourism (2013)

(Billion \$)



□ Top-10 countries earned **US\$ 104 billion** as international tourism receipts in 2013.

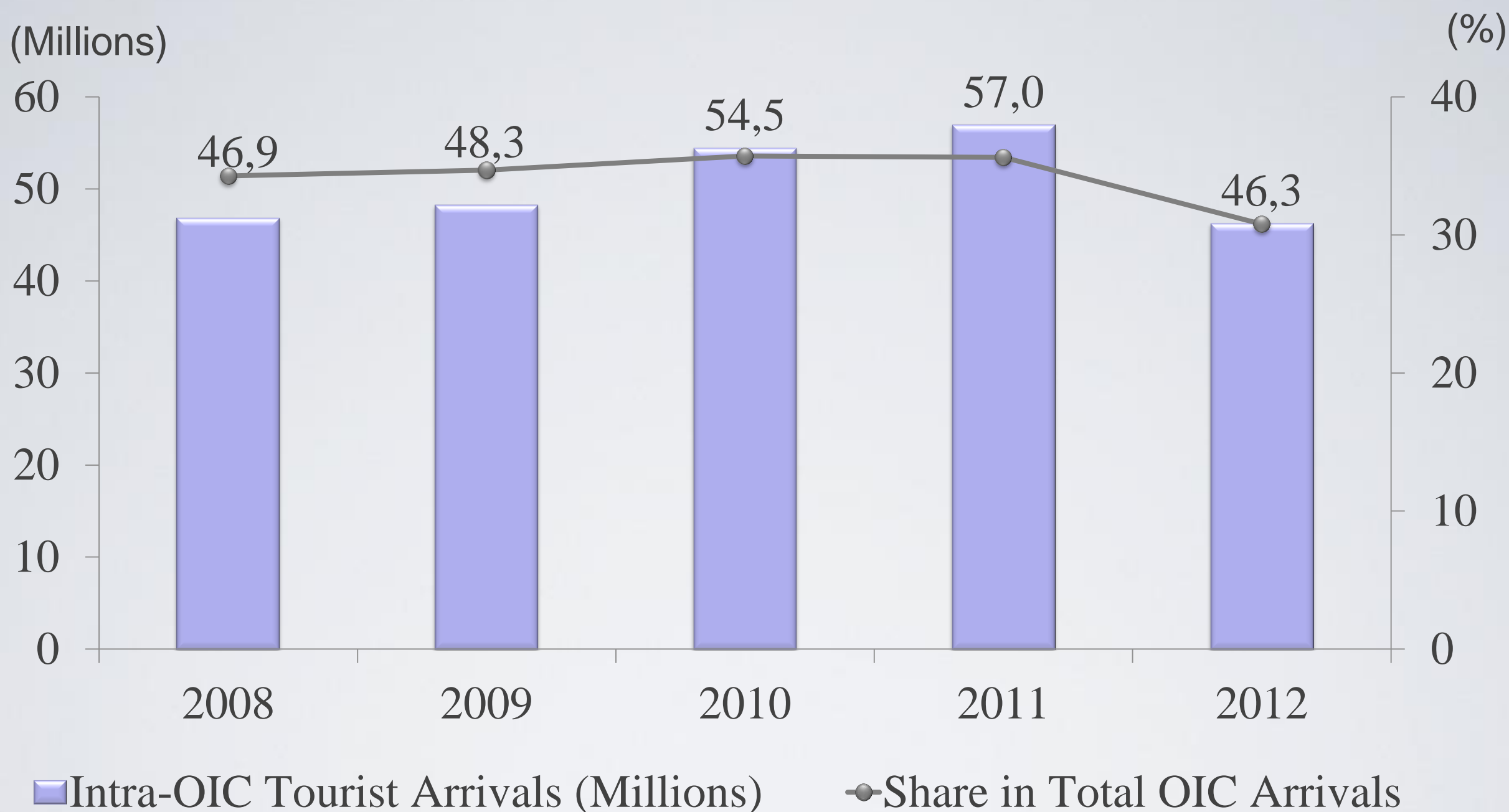
# Member Countries by Major Surplus on the Travel Balance In 2013 (US\$ billion)

	Tourism Receipts			Tour. Expenditures			Balance		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
<b>Turkey</b>	25.1	25.3	28.0	4.9	4.1	4.8	<b>20.2</b>	<b>21.3</b>	<b>23.2</b>
<b>Malaysia</b>	19.7	20.2	21.5	10.2	12.2	12.2	<b>9.5</b>	<b>8.0</b>	<b>9.3</b>
<b>Morocco</b>	7.3	6.7	6.9	1.3	1.3	1.3	<b>6.0</b>	<b>5.4</b>	<b>5.5</b>
<b>Jordan</b>	3.4	4.1	4.1	1.2	1.1	1.1	2.3	2.9	3.0
<b>Egypt</b>	8.7	9.9	6.0	2.2	2.6	3.0	<b>6.5</b>	<b>7.3</b>	<b>3.0</b>
<b>S. Arabia</b>	8.5	7.4	7.7	17.3	17.0	17.7	<b>-8.8</b>	<b>-9.6</b>	<b>-10</b>
<b>UAE</b>	9.2	10.4	-	13.2	15.1	-	<b>-4.0</b>	<b>-4.7</b>	-
<b>Indonesia</b>	8.0	8.3	9.3	6.3	6.8	7.3	1.7	1.5	2.0
<b>Qatar</b>	1.2	2.9	3.5	1.8	5.6	6.6	<b>-0.6</b>	<b>-2.7</b>	<b>-3.1</b>
<b>Lebanon</b>	6.5	6.0	-	4.0	3.9	-	2.5	2.1	-
<b>Iran</b>	2.4	1.2	-	9.8	6.6	-	<b>-7.4</b>	<b>-5.4</b>	-

❑ Turkey ranks as 5th, Malaysia as 11th, Morocco as 16th, Jordan as 22th and Egypt as 23th country in international tourism market in 2013.

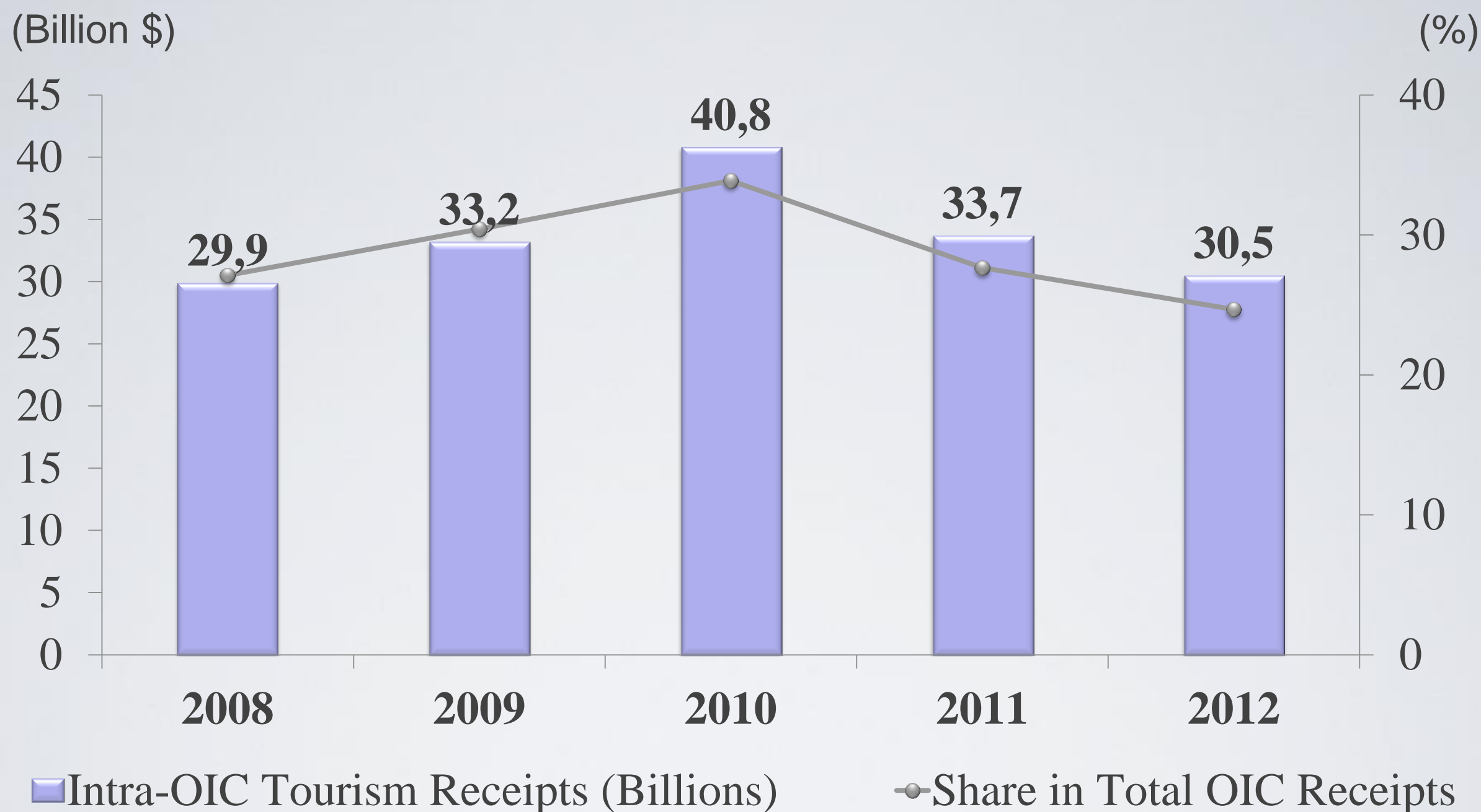


# Intra-OIC Tourist Arrivals 2007-2012



Source: SESRIC, 2014

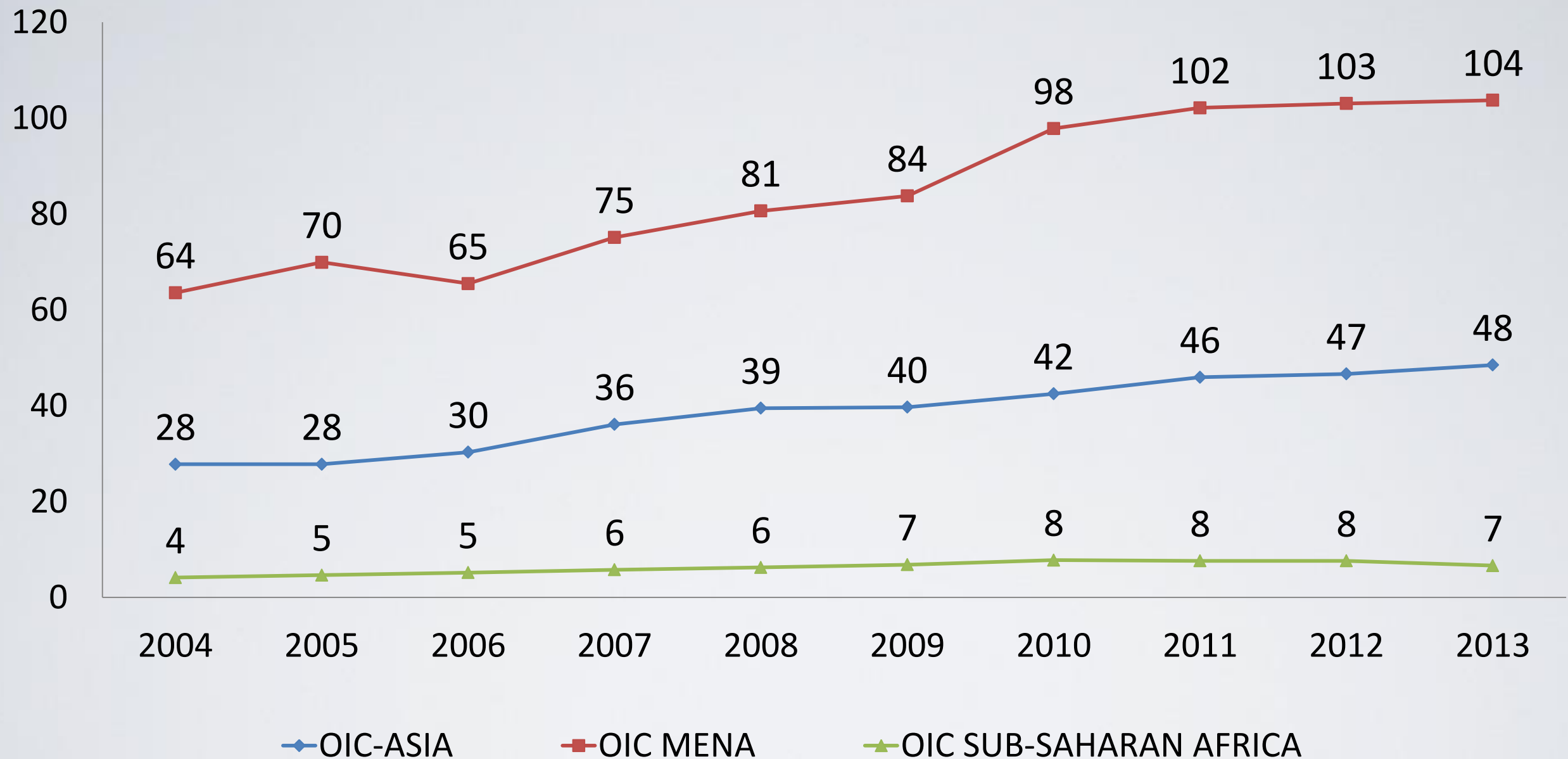
# Intra-OIC Tourism Receipts 2007-2012



Source: SESRIC, 2014

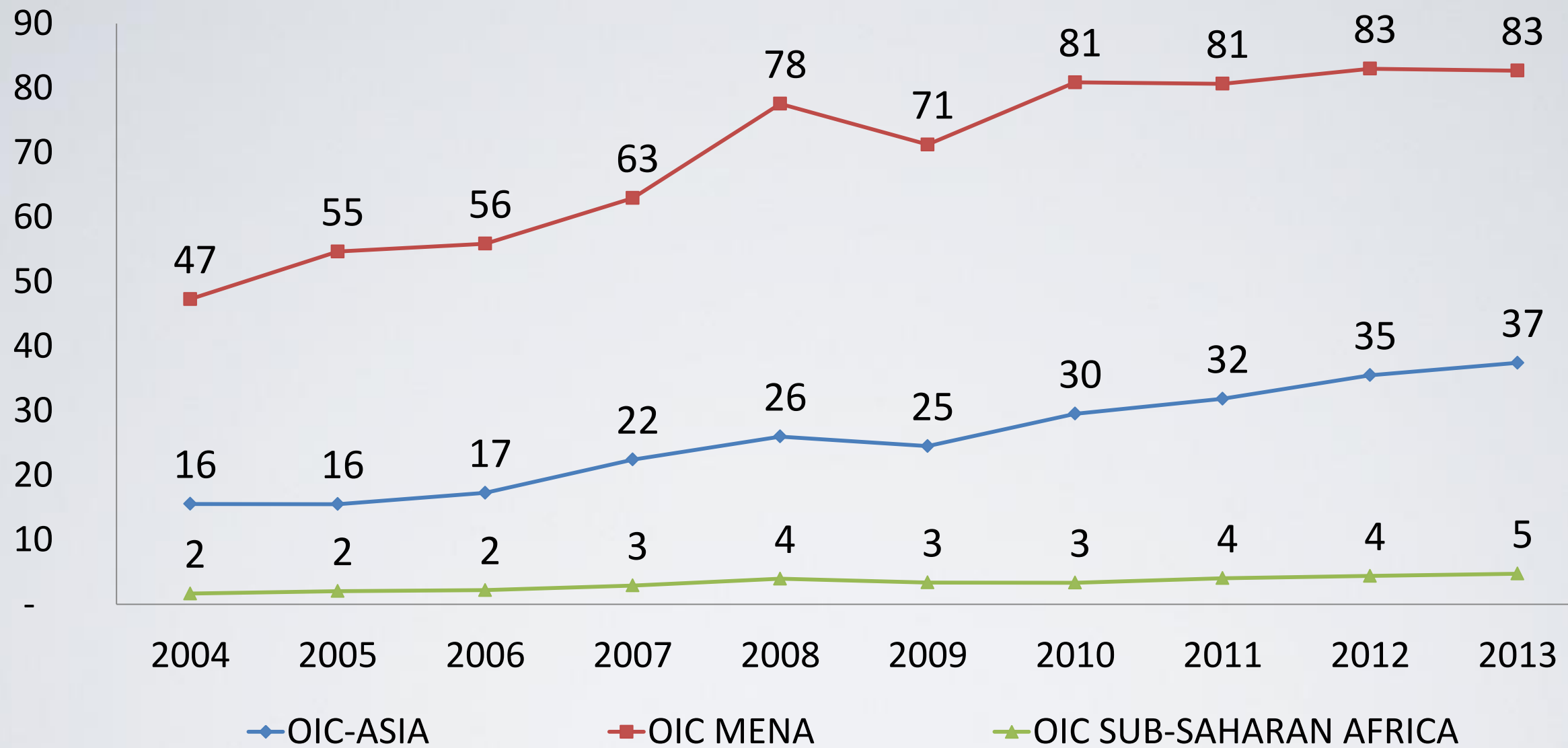
# Tourist Arrivals in OIC Regions (OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa)

(Millions)



# Tourism Receipts in OIC Regions (OIC-MENA, OIC-Asia, OIC-Sub-Saharan Africa)

(Billion \$)



# Recent Developments in the OIC Member Countries

- **Saudi Arabia** (+15%), **Oman** (+28%) and **Palestine** (+13%) reported solid growths.
- **Turkey** realized 6% more arrivals compared to 2013.
- **Indonesia** and **Malaysia** posted almost 10% more arrivals in the first ten months of 2014.
  - The Visit Malaysia Year 2014
- **Maldives** reported 9% increase for the first ten months of 2014.

Source: UNWTO

# Recent Developments in the OIC Member Countries

- ▶ **Morocco** recorded 3% increase in tourist arrivals for the first ten months of 2014.
- ▶ **Jordan (+3%)** and **United Arab Emirate of Dubai (+2%)** showed more moderate growths.
- ▶ **Egypt (+1%)** returned to positive figures.
  - ▶ «Masr Wahashtouna»
- ▶ **Lebanon (+4%)** has also reported growth.

Source: UNWTO



# Recent Developments in the OIC Member Countries

- ▶ **Sierra Leone**, reported a 37 % decrease through October of 2014 due to Ebola Disease.
- ▶ **Guinea** is also affected from Ebola outbreak.
- ▶ **Tunusia** experienced a slight decrease (-1%)
- ▶ **Azerbaijan (-9%)** and **Kazakhstan (-6%)** decreases in arrivals for the first ten months of 2014.

Source: UNWTO

# Tourism Opportunities and Challenges for the OIC Member Countries

## Opportunities



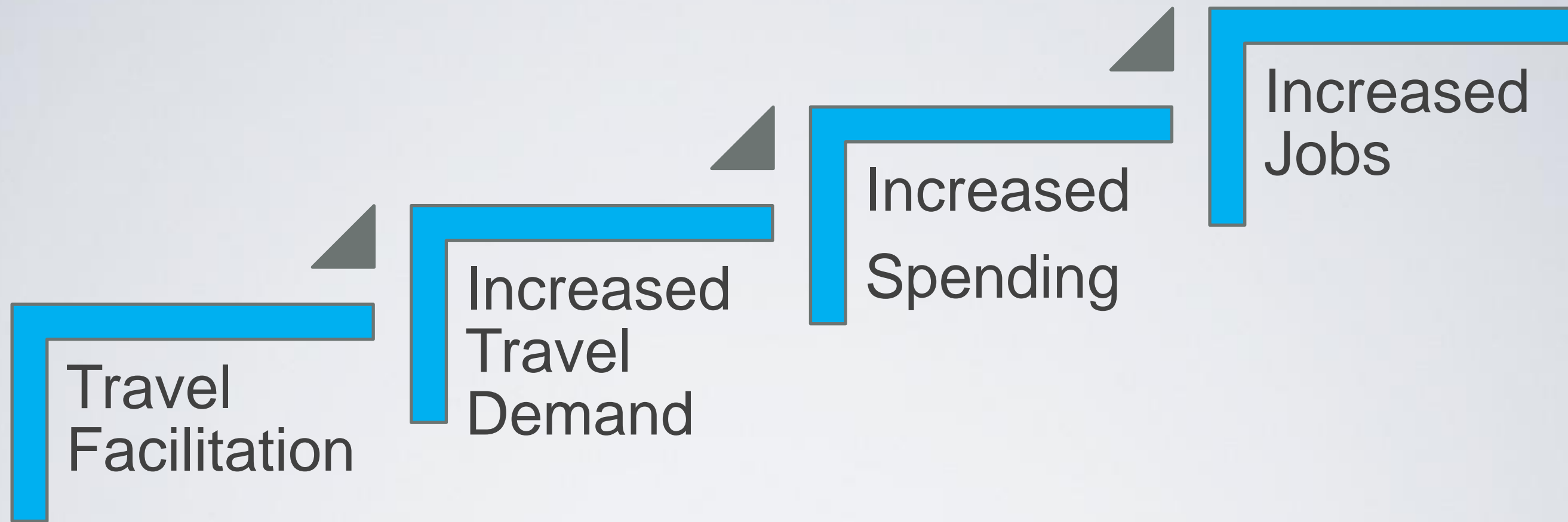
- ☐ Natural Resources
- ☐ Cultural Resources
- ☐ Human Resources
- ☐ Authenticity and newness
- ☐ Price competitiveness
- ☐ Dynamism

## Challenges



- ☐ Insufficient Tourism Investments and Infrastructures
- ☐ Poor Tourism Planning & Product Development
- ☐ **TRAVEL FACILITATION PROBLEMS**
- ☐ Safety and Security Related Problems
- ☐ Low Tourism Service Quality
- ☐ Insufficient Marketing and Promotion
- ☐ Insufficient Image Building and Branding

# Travel Facilitation



# Some policies for facilitating travel

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- Improve delivery of Information
- Facilitate processes to obtain visas
- Differentiate treatment to facilitate tourist travel
- Use technology & Institute e-Visa Programs
- Develop new air routes and increase airline capacity
- Engage in well-funded and targeted destination marketing

# Making Cooperation Work

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# THANK YOU

**www.comcec.org**

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